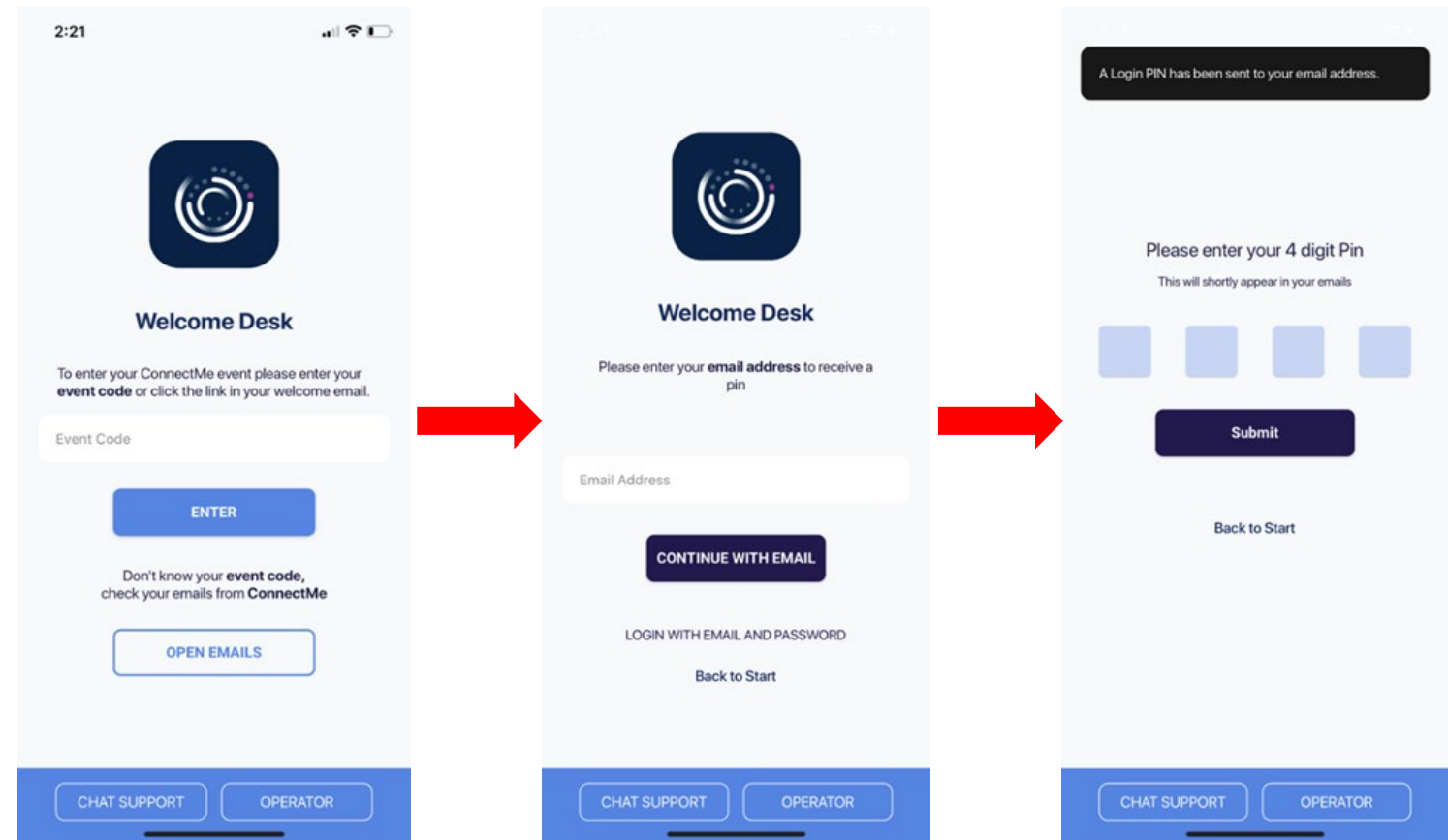


# Lead Retrieval

# LEAD RETRIEVAL – HOW TO SETUP, SCAN AND COLLECT LEADS ONSITE

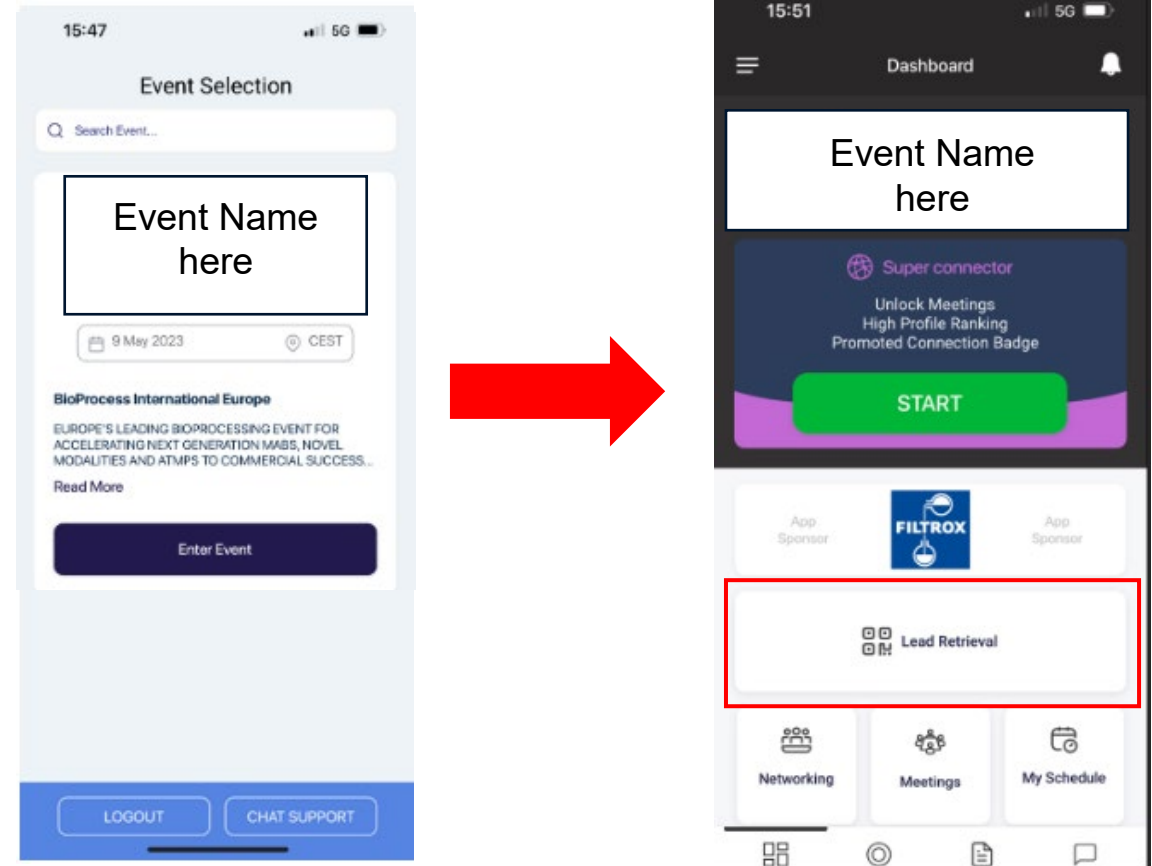
1. On your personal device, please download the ConnectMe app. To find it in the App Store / Google Play, please search 'ConnectMe by Informa'.
2. Once downloaded, please enter the event code: **LS2025**.
3. Enter your email address used to register for the conference, to which you will receive a 4-digit pin to login



# LEAD RETRIEVAL

4. Once entered, please select the BPI Europe event to enter. The dashboard on the right should appear and you will have the **Lead Retrieval** button which will take you to the lead scanning page.

*If you do not see this button on your screen, please contact [Ally.Lear@informa.com](mailto:Ally.Lear@informa.com)*



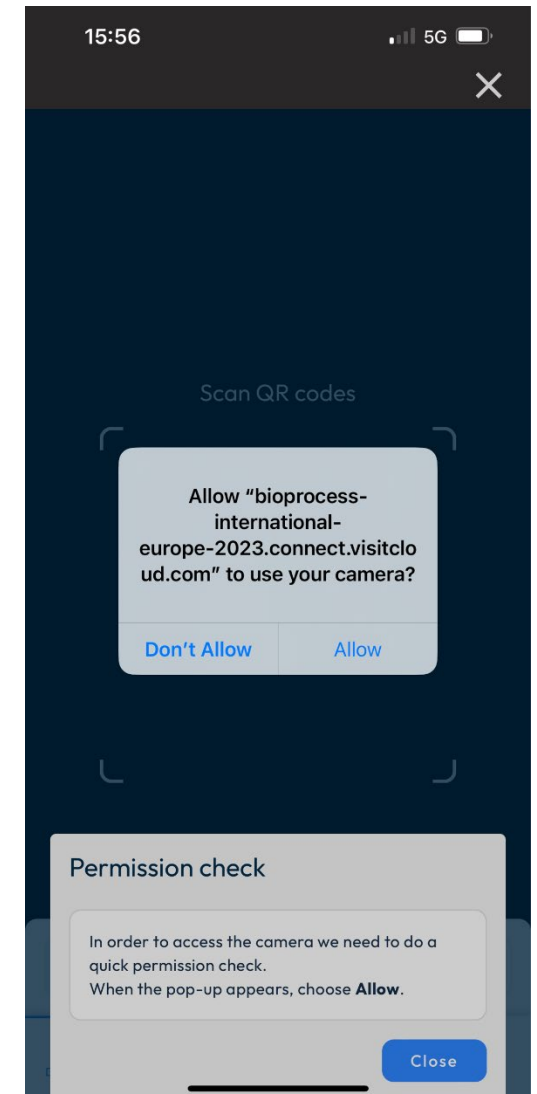
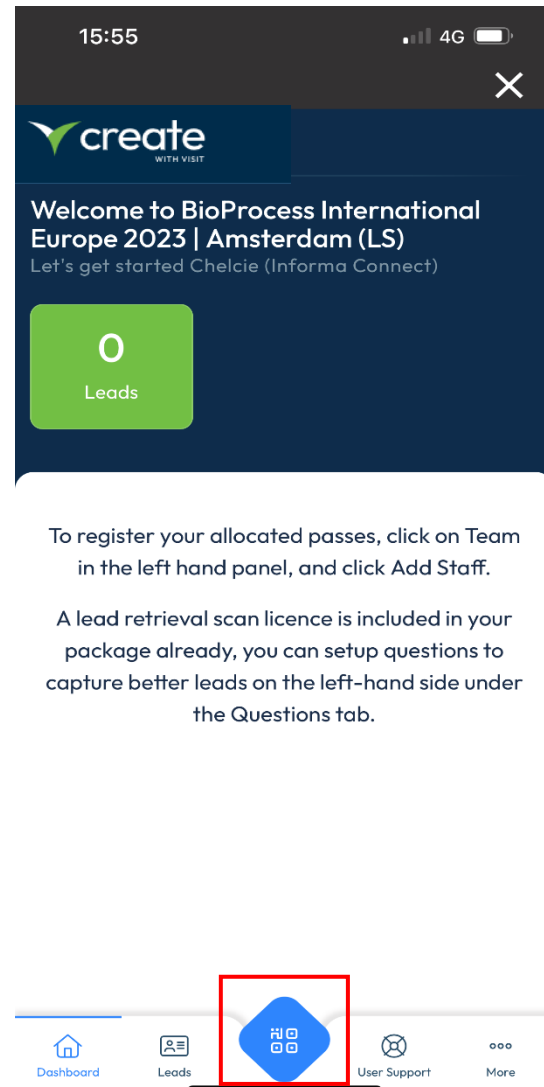
# LEAD RETRIEVAL

5. This takes you to the partner portal for capturing leads. To begin scanning click the blue button at the bottom of your screen.

6. Make sure your camera permissions are set to "allowed" in order to scan.

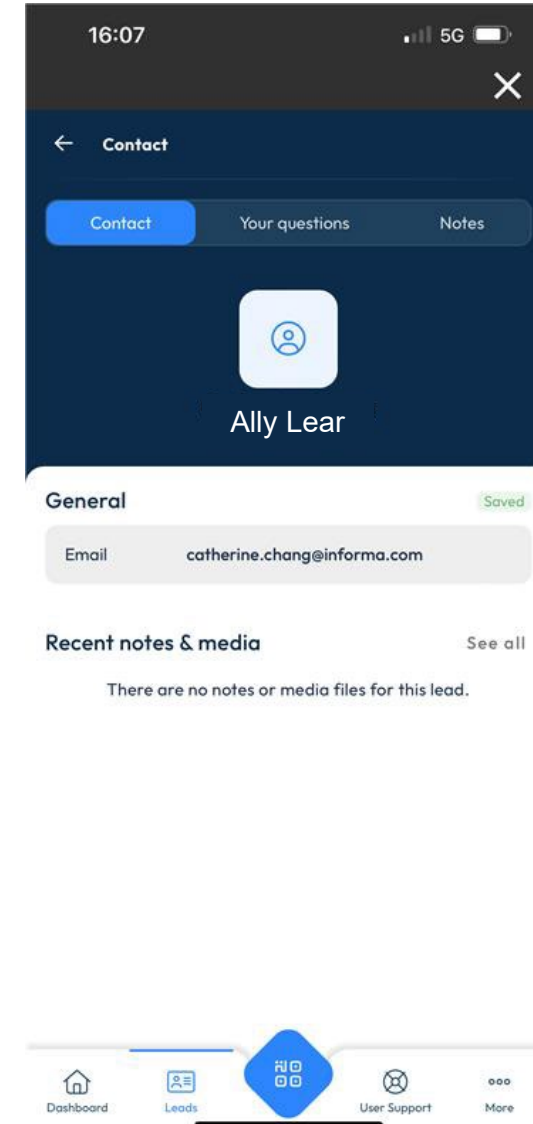
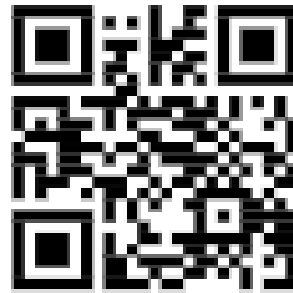
*\*The specific name of your event will be shown*

*If you do not see this button on your screen, please contact Ally.Lear@informa.com*



# LEAD RETRIEVAL

7. Scan the test QR code to test:



8. These QR codes will be printed on attendee badges onsite which will be easier to scan.

Once scanned, the page will show the attendee details and you are then able to add your own notes/media files and answer any preset questions.

Click the back button at the top left to go back to your main dashboard, which will show all your scanned leads in one place.

# LEAD RETRIEVAL FAQ's

## PRE-EVENT

### **How do I setup my team so that they have access to capture leads?**

As the main contact for your team, login to the *Create with Visit* portal link sent to you by your operations manager to register your allocated passes for the event. Go to TEAM on the left-hand side navigation bar, and then select *Add Staff*. Once your team has been entered, they will be automatically setup with access to lead retrieval.

### **Can I setup custom questions?**

Yes – your company's main contact person can set these for your team via the *Create with Visit* portal under *Questions*.

### **How many custom questions can we have?**

You can have an unlimited amount.

### **Is there a character limit for the questions I set?**

There is a 100-character maximum for questions (including spaces).

### **When is the deadline for customizing questions?**

There is no deadline, you can keep updating questions right up until the event.

### **Is it possible to get a developer's kit so that we can use our own lead retrieval system?**

Unfortunately, it is not possible to use your own lead retrieval system. Lead retrieval for this event can only be used via the system provided through the *ConnectMe* app. You cannot scan badges with another program.

### **I want to stop my colleagues attending from downloading leads. Is this possible?**

Yes, in your *Create with Visit* portal, go to TEAM on the left-hand side. Hover your mouse over the attendee whose permission you would like to change and select the *Edit* icon on the right-hand side. From here, you can change whether that person can: capture leads, export leads, show all leads or have admin permissions.

### **What does "admin" permission mean?**

An Admin user will have access to dashboard, users, profile questions, leads and agenda. This included managing registration and downloading the team's leads.

# LEAD RETRIEVAL FAQ's

## DURING THE EVENT

**Require help onsite?**  
Visit the Helpdesk at registration for all Lead Retrieval Support.

### **How do I access the lead scanner?**

Download *ConnectMe by Informa* via your smart-device's app store. Do not let your team of booth scan staff log in directly to the Create with Visit website as it may cause issues with your data.

### **What is the event code for the *ConnectMe* App?**

LS2025

### **How do I login to the app?**

Enter the email address that was used to register for the event.

### **How do I scan badges with the *ConnectMe* App?**

Once logged in, on your dashboard you should see a *Lead Retrieval* button. Click this to begin scanning badges. If you do not see this button, please visit the helpdesk at registration.

### **Are the leads GDPR compliant?**

All attendees are asked an explicit opt-in consent statement as a required stage of the delegate badge process. Please see example [here](#). If your company requires a specific question to be asked, the easiest way of capturing this would be to create a custom question at setup.

### **Does lead scanning work if there is no internet connection?**

Yes, you can still scan badges. The app will synchronise the missing information as soon as you reconnect to the internet. There will be event WiFi available to all attendees.

### **Can I see the leads I've scanned in real-time?**

Yes, all the leads you have scanned will show on the lead retrieval dashboard. From there, you can export these leads straight away.

### **Can I see a consolidated list of leads scanned by my team?**

Yes, on the VISIT by GES pass registration portal under *Leads*, you can view and export your team's scanned leads. This will show which colleague scanned which delegate line by line.

### **Can I give permission to my colleagues to view and export all the leads on their devices?**

Yes. As an admin user, you can click on the homepage > Team and see all the colleagues who are using Create with Visit. In the Permissions column, there are shown the 4 types of access:

- *Admin permissions* – in this case, the user becomes an admin user
- *Show all leads* – the user will be able to see the leads captured by other team members
- *Allow capture leads* – this option is already enabled when a user is registered
- *Allow export leads* – when enabled, the user can export the leads

# LEAD RETRIEVAL FAQ's

## POST EVENT

### **Where can I find my booth scan leads post-event?**

By accessing Create with Visit from a desktop, you can export a .csv file of your team's leads including any notes that were made. Your main contact from each company can do this. Your booth scan data can also be accessed within Lead Insights.

### **Will the leads I scanned be sent to me?**

Your leads will be consolidated post event by our team and included in your Lead Insights account. You'll receive instructions for access before the event begins. Contact [leadinsights.lifesciences@informa.com](mailto:leadinsights.lifesciences@informa.com) for assistance.

### **What is Lead Insights?**

Your dashboard contains all your event lead data in a single view. You will receive an email from "Lead Insights" with directions on how to access your data on at the start of the event. Your dashboard will continue to be updated during and after the event – all accessible through the same login credentials. To enable your colleagues with direct access, just log in, click on your account settings in the top right corner, click "My Team" then add your colleagues so they will receive an automated invitation to set up their accounts. [Contact us](#) for assistance.

### **Why doesn't my Lead Insights dashboard show the booth scan notes my team entered?**

All booth scan notes and answers can be found on the Create with Visit portal. Go to *Connections* on the left-hand side navigation bar and click *Export*. This will contain your scan notes. You can also access your booth scan notes via Lead Insights by navigating to the detail page on that individual lead or by exporting all your lead data from the "Data Management" section. Your booth scan notes are not yet available from the "Leads" section export.



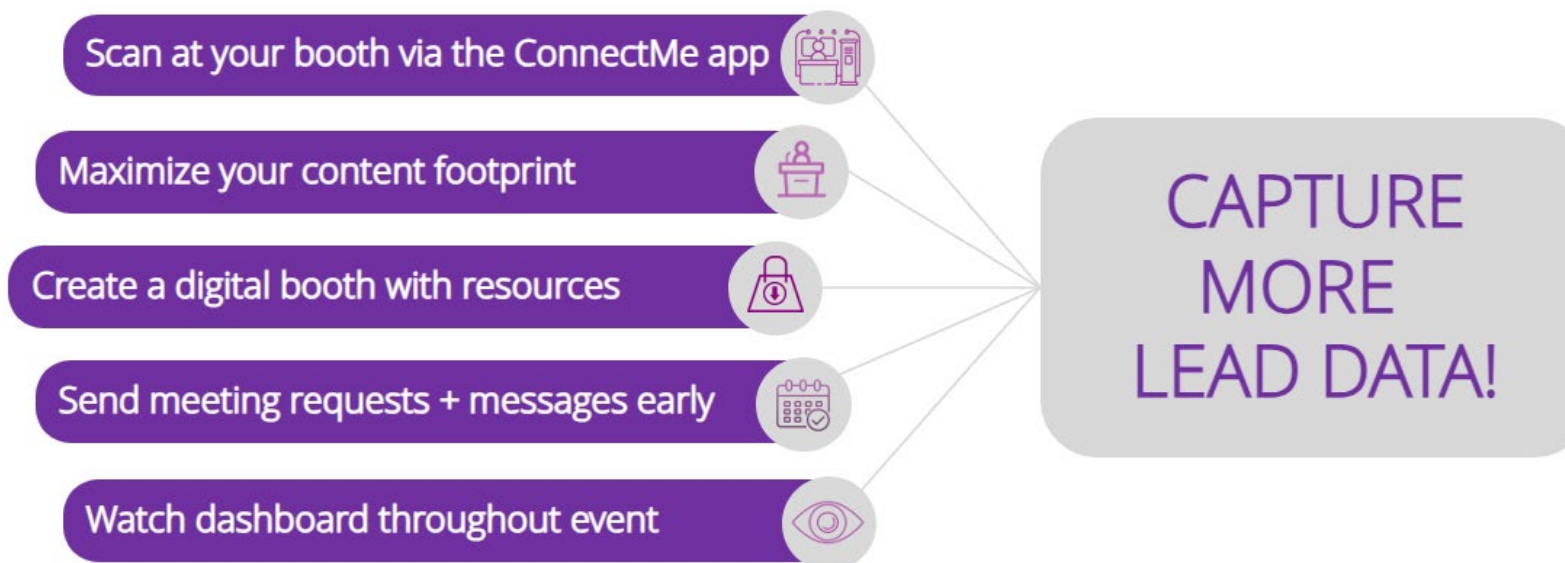
# Your Lead Insights Dashboard

## Access your Lead data

Your dashboard contains all event lead data in a single view. Pre-event, you will receive an automated email from "Lead Insights" with instructions for setting up your account. The timing for data to populate your report will vary by event so contact [leadinsights.lifesciences@informa.com](mailto:leadinsights.lifesciences@informa.com) or your account manager for more details.

Keep in mind that your company's primary contact also has real-time access to your raw scan data if exported directly from the "Lead Retrieval" section in ConnectMe. For questions [contact us](#).

### Tips to Maximize Lead Capture



## Engagement Types found on your Lead Insights report

Activity Type	Description
Ad Click	Delegate clicked an in-platform banner ad from your company (not applicable to most sponsors)
Booth Visit - Digital	Attendee visited your company's showcase page
Booth Visit - Onsite	Delegate scanned by your staff at the onsite exhibition
Content View – Digital Showcase/Exhibit	Delegate scanned a QR code at your onsite booth to add your collateral or booth listing to their delegate bag (not applicable to some events)
Meeting Scheduled	Pre-arranged meeting with a specific time accepted between your staff and a delegate
Meeting Unconfirmed	Delegate requested a meeting with your staff with no response from your staff
Poll Respondent	Delegated answered your sponsored poll question
Poster View	Delegate viewed and/or downloaded your sponsored poster presentation
QR Code Scan - Onsite	Delegate scanned a QR code at your onsite booth to add your collateral or booth listing to their delegate bag
Scheduled Session	Delegate added your sponsored session to their custom agenda
Session Attend – Live Digital	Attended a live session sponsored by or presented by your staff on the digital platform
Session Attend - OD	Delegate viewed an on-demand session sponsored by your company
Session Attend - Onsite	Attended a live face-to-face session sponsored by or presented by your staff
Session Question	Question submitted in association with your session (live or on-demand)



- Access lead retrieval to scan attendee badges\*
- View attendee directory
- Send direct messages and meeting invitations
- Set up and view virtual exhibit booths
- Access event content agenda
- Stream live (hybrid events) and on-demand sessions
- Scan exhibit booth QR codes

## Who has access?

**Sponsors, speakers and all attendees**

[Download the app](#)

Enter App code: LS2025

(Event registration required to use conference app)

*\*All sponsor team members should see a “Lead Retrieval” button on the home screen of the ConnectMe app.*

Key Support Contact

**Digital Event Ops**

[Jamie.Gulden@informa.com](mailto:Jamie.Gulden@informa.com)

## REGISTRATION SYSTEM



- Register staff with contracted complimentary event passes
- Access all badge scan data captured by your team
- View badge scan notes
- Set up custom badge scan questions

## Who has access?

**Sponsor’s main contact only**

*Your main contact will receive pre-event access via email to set up your team registration and lead retrieval*

Key Support Contact

**Exhibitor Ops**

[Ally.Lear@informa.com](mailto:Ally.Lear@informa.com)

## LEAD REPORTING & ANALYTICS



- Access all your event leads, including session attendance, booth/badge scans, scan notes, virtual booth visits, and more
- View individuals/companies that are most engaged with your company
- Export your full event lead data
- Lead data is updated throughout event

## Who has access?

**Contract signer and main contact**

*You’ll receive an email pre-event with access to your account, and you can extend access to colleagues. If you have questions about your lead data or access, please contact us.*

Key Support Contact

**Lead Data Delivery**

[leadinsights.lifesciences@informa.com](mailto:leadinsights.lifesciences@informa.com)